choose and book

NHS

End User Manual for Service Provider Administrators for Directly Bookable Services in Choose and Book R2

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Sue Wales, Choose and Book

END USER MANUALS FOR SERVICE PROVIDER ADMINISTRATORS for DIRECTLY BOOKABLE SERVICES for CHOOSE AND BOOK R2

CHOOSE AND BOOK PROGRAMME

Welcome to the End User Manual for Service Provider Administrators for Directly Bookable Services in Choose and Book R2.

Some of the contents of this training pack are adapted from training materials provided by Cerner.

Contact:
Sue Wales
Choose and Book team,
NHS Connecting for health
50 Eastbourne Terrace
Paddington
London W2 6LX
sue.wales@npfit.nhs.uk

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2 Background to Choose and Book

Choose and Book is the nationally commissioned system built by Atos Origin to provide the NHS with an electronic booking and choice tool. Choose and Book first went live in 2004, then in June 2005 Release 2 of Choose and Book (R2) went live.

Choose and Book enables a patient to choose which hospital they wish to attend for an outpatient appointment from those commissioned by their primary care trust (PCT), and make a booking of the time and date of their choice, from those available.

The clinical referrer (usually the GP) will initiate the booking, by selecting the appropriate types of clinic or service that the patient needs to be referred or booked in to, and thus creating an 'Appointment request'. The referrer can select both **Directly Bookable services** and **Indirectly Bookable services (IBS**).

A **Directly Bookable service** is one where the referrer can book the patient electronically into an appointment in the service provider's Patient Administration System (PAS). To do this, the provider organisation must have a Choose and Book Compliant PAS.

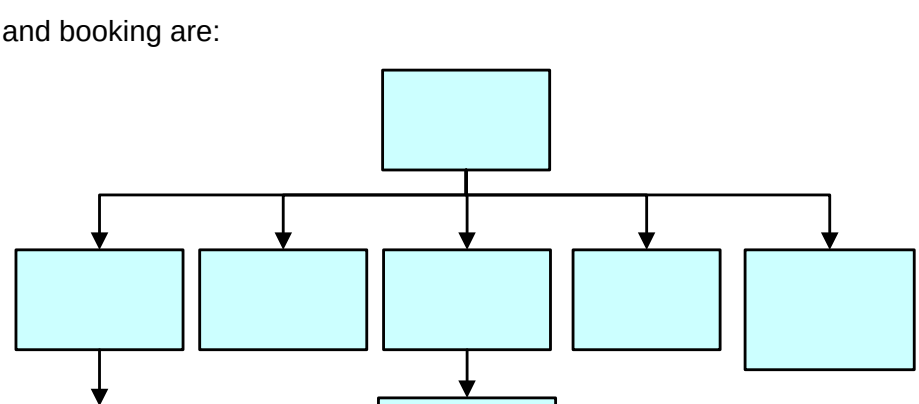
An **IBS** is a service where there is no Choose and Book Compliant PAS, but there is a Booking Manager at the end of the telephone for the patient to call to make their booking. For an IBS, the referrer still completes the Appointment Request, but the patient will complete their booking with the IBS Booking Manager at the service provider. ***NB: There is a separate End User Manual for the Booking Manager role for IBS services.***

If the referrer does not have the time to complete an electronic booking during their patient consultation, the referrer could send the patient out to the practice reception to complete their booking, or the patient could go home to think about the choices and then call the BMS call centre or IBS call centre to complete their booking of date and time.

Once a GP has sent an electronic referral letter via Choose and Book, and a booking has been made for the patient, then that booking and referral letter is available for the

service provider / hospital clinician to review. The hospital team may accept or reject the booking.

The functions that a service provider Medical Secretary or Outpatient Administrator of a Directly Bookable Service can do in Choose and Book when processing a referral and booking are:



Print off a referral letter for

Print
referral le

3 Accessing Choose and Book with your Smartcard

3.1. Using your Smartcard

A Smartcard looks much like a credit card, with a picture of the user, together with their Unique Identification number (UID) and a gold chip where all the information is held.

⇒ To access Choose and Book, you should already be logged on to your computer, so you see your desktop on your screen

⇒ Put your smartcard into the smartcard reader

⇒ The Gem Authenticate box appears

⇒ Type in your PIN number (also called passcode) and click on '**OK'** or press return on the keyboard

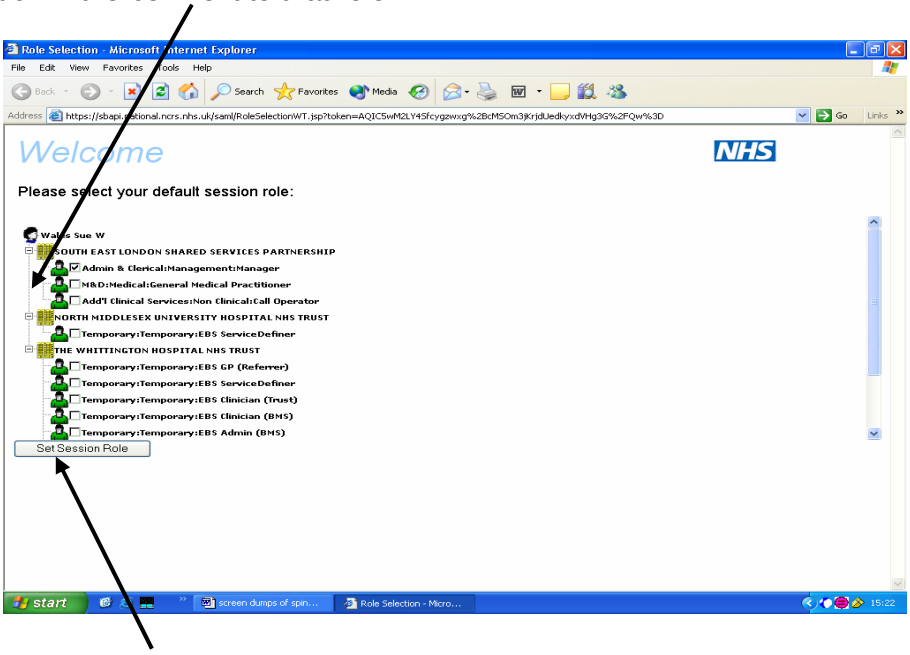
⇒ You *may (or may not, depending on local set-up)* now see a security alert.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The security certificate has a valid name matching the name of the page you are trying to view.
Do you want to proceed?
Yes
No
View Certificate

⇒ Click '**Yes'** to proceed.

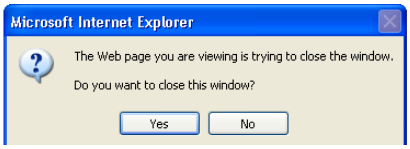
⇒ You may have to wait a few seconds, but you then see a screen saying '**welcome'** with the role(s) you have been allocated on the Spine.

⇒ Click in the box next to the role you wish to be for this session so there is a tick in the box next to that role.



⇒ Click on '**set session role**'

⇒ Now the system asks if you want to close the present window. Click on '**Yes'**.


Microsoft Internet Explorer
The Web page you are viewing is trying to close the window.
Do you want to close this window?
Yes
No

⇒ You are now returned to your desktop, having successfully logged on to the Spine.

3.2. If you have a Choose and Book icon on your desktop:

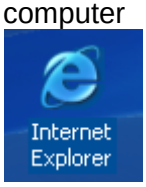
⇒ Double-click on the Choose and Book icon on the desktop to launch Choose and Book

⇒ Choose and Book sometimes takes a little while to check your authentication, and then if you have one Choose and Book Business Function the homepage will open; if you have more than one Business Function you will go to the Role Selection screen.

⇒ You have now accessed Choose and Book using your smartcard

3.3. If you do NOT have a Choose and Book icon on your desktop:

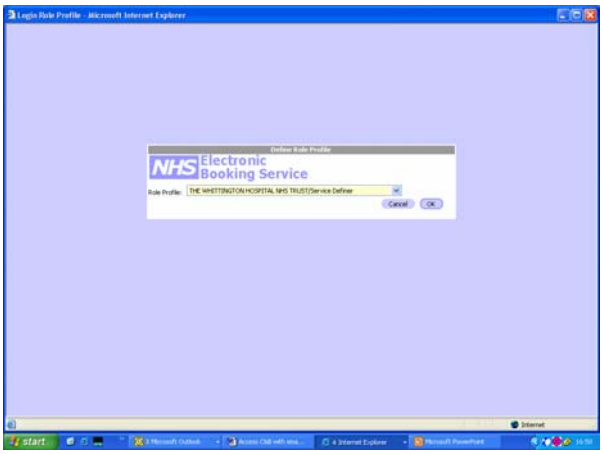
⇒ Open Internet Explorer on your computer



⇒ In the address box of the internet screen, type in **https://nww.ebs.ncrs.nhs.uk/app-ebs**

⇒ Choose and Book sometimes takes a little while to check your authentication, and then the Choose and Book homepage will open showing you the Choose and Book business functions available to you

⇒ You have now accessed Choose and Book using your smartcard

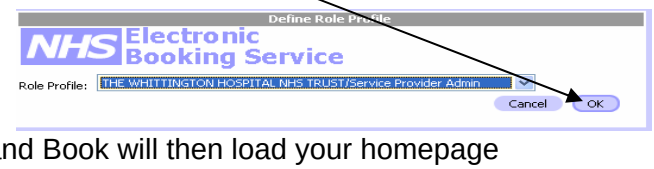


NB: Your Smartcard must remain in the smartcard reader for the whole time that you are using the system. If you pull your Smartcard out of the reader, your session will end.

3.4. Selecting your Role in Choose and Book

⇒ As a Service Provider Administrator, within Choose and Book you may have been given the role of "**Service Provider Admin**" and "**Service Provider Clinician**". You will have been given 2 roles because the functions you may need to do your job in Choose and Book are not contained within one role.

⇒ Select the '**Service Provider Admin' or 'Service Provider Clinician'** role from the picklist and click '**OK'** to access Choose and Book functions



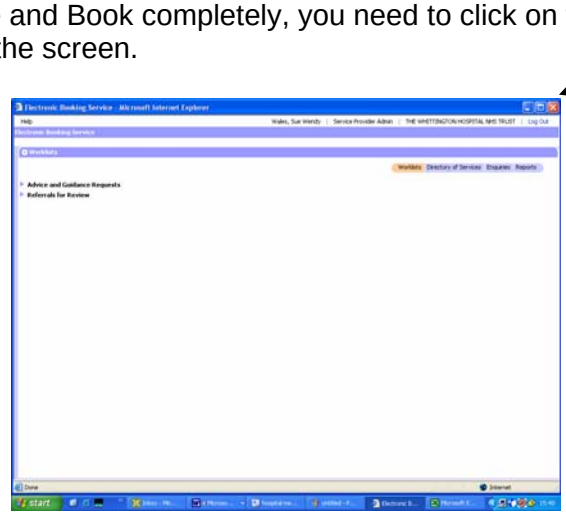
⇒ Choose and Book will then load your homepage

3.5. Logging out of and Closing Choose and Book

⇒ To log out of Choose and Book you click on Log Out near the top right of the screen

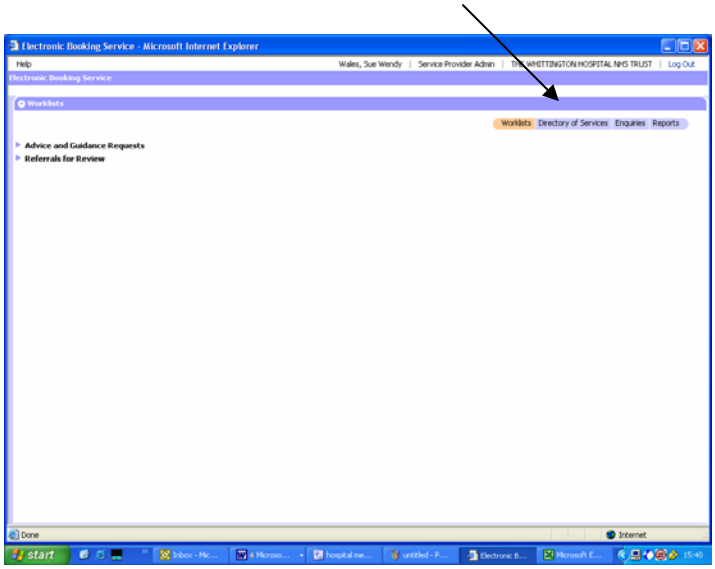
⇒ This takes you back to the selecting role screen, so you can select another Choose and Book role, and go back in to the tool from here.

⇒ To exit Choose and Book completely, you need to click on the '**X**' at the top right corner of the screen.

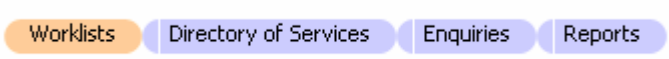


3.6. Your Homepage

⇒ As either 'Service provider Admin' or 'Service Provider Clinician', your homepage has 4 main sections shown on the right hand side of the screen: **Worklists, Directory of Services, Enquiries** and **Reports**.



⇒ To enter each section, you click on the tab with the appropriate label (e.g. worklists)



⇒ The **Worklists** section lets you view any requests for advice and guidance, or any new referrals for your team (see sections 4 and 6).

⇒ The **Directory of Services** section lets you browse the Directory of Services

⇒ You can access enquiries by clicking on '**Enquiries**' (see section 12).

⇒ You can access reports by clicking on '**Reports'** (see section 12).

⇒ Your Homepage is where all actions start from in both roles, but the actions you can do from the homepage are different for the 'Service Provider Admin' role and the 'Service provider Clinician' role.

4 Printing off a Referral Letter for your Consultant to Review

NB: A referral letter will not be seen by the service provider (e.g. hospital or GPSI) until it has been sent by the referrer via Choose and Book, and the patient has had an appointment booking made.

4.1. Getting to the Referral Letter Section

⇒ Log in as '**Service Provider Clinician'** (NB: if you log in as Service Provider Admin, you will not be able to open the referral letter)

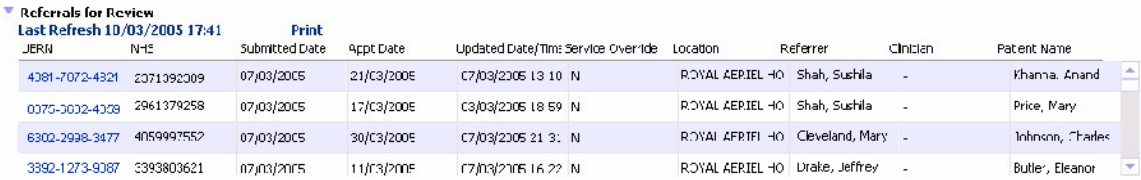
⇒ Click on

to show the two types of worklists available to you.

⇒ Click on '**Referrals for Review**'

⇒ You now see a list of all new referrals (bookings made) that still need to be reviewed.

⇒ If your hospital/service has a Choose and Book R2 Compliant PAS, then you can filter the list so you can see either all the referrals referred to your service, or you can see those patients referred to particular 'Named Clinicians'. by service and/or clinician. Check the columns, this screen shot is very old – There is an "allocated clinician" column which also shows an asterisk if they are named.


Referrals for Review

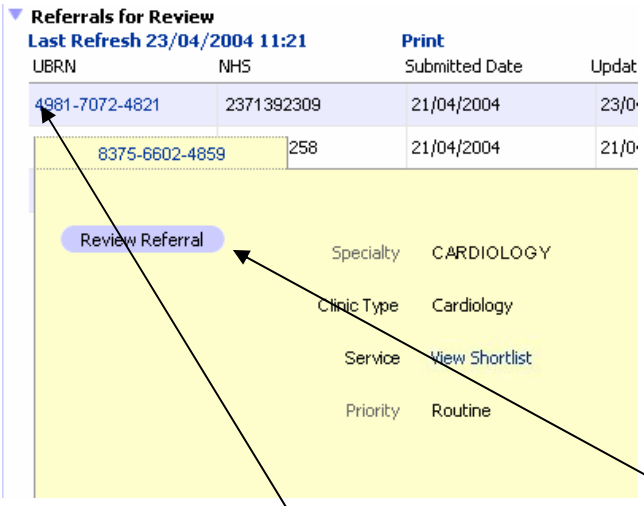
Last Refresh 10/03/2005 17:41 Print

UBRN	NHS	Submitted Date	Appt Date	Updated Date/Time	Service Override	Location	Referrer	Clinician	Patient Name
4381-7072-4321	2371392309	07/03/2005	21/03/2005	07/03/2005 13:10	N	ROYAL AERIEL HO	Shah, Sushila	-	Khanna, Anand
0075-3032-4038	2961379258	07/03/2005	17/03/2005	03/03/2005 18:59	N	ROYAL AERIEL HO	Shah, Sushila	-	Price, Mary
6302-2998-3477	4059997552	07/03/2005	30/03/2005	07/03/2005 21:3:	N	ROYAL AERIEL HO	Cleveland, Mary	-	Johnson, Charles
3392-1273-9087	3393803621	07/03/2005	11/03/2005	07/03/2005 16:22	N	ROYAL AERIEL HO	Drake, Jeffrey	-	Butler, Eleanor

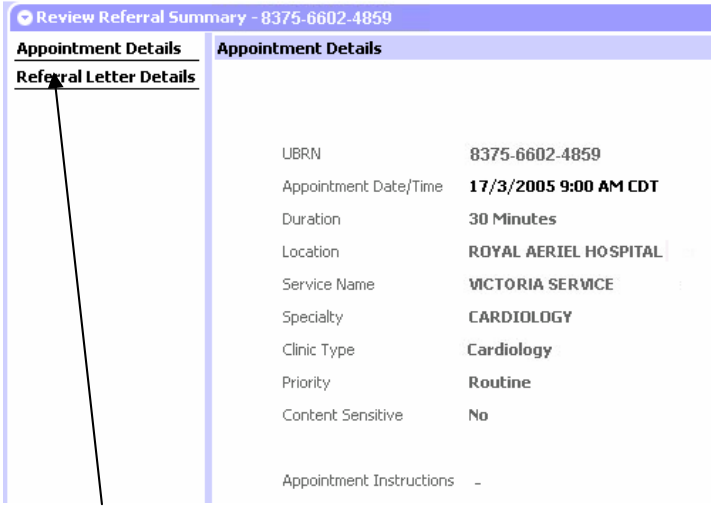
⇒ The list shows:

UBRN	The patient's Unique Booking Reference Number
NHS	The patient's NHS number
Submitted date	The date that the appointment request was submitted check this. Ref letter submitted or Ref Req created?
Updated date/Time	The date/time that the referral letter was last updated.
Service Override	The referrer has over-ridden the Service Selection Booking Guidance
Location	The location of the service for the booking
Referrer	The name of the referrer

Clinician	If the referral is to a Named Clinician, the name of that Named Clinician
Patient Name	The name of the patient referred



⇒ To open a referral letter, click on the UBRN in blue and then click on '**Review Referral**' to see a summary of the Appointment Details

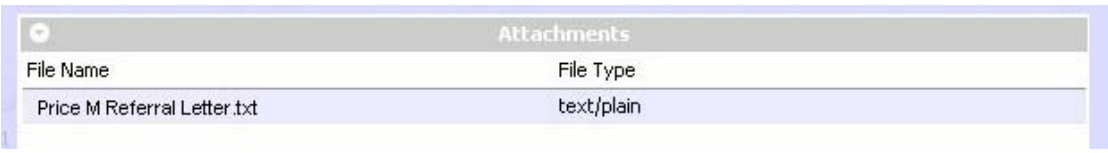


⇒ Click on **Referral Letter Details**

⇒ Click **Attachments**

⇒ You now see the attachment(s) of the referral letter

⇒ Select the attachment you wish to open and print off, and click **Open**



⇒ If the referral letter has attachments with it, or it has been sent as an attachment, click on '**Attachments'**. Please note, it is important that you open the attachments and print them all off to ensure the clinician has the full referring information from the referrer.

⇒ Select the attachment you wish to review or print off

⇒ Click on "**Print**" from the print box, and select the printer to send it to. Click "**Print**"

⇒ Click "**Close**" to return to your homepage.

⇒ Give the printed letter and any attachments to your consultant to review and record on it 'accept' or 'reject'. NB: the consultant should also be reviewing the Referrers Priority and the booked appt date for appropriateness.

5 Accepting or Rejecting a Referral on behalf of your Consultant

NB: Before you can accept or reject a referral/booking on behalf of your Consultant you must get the Consultant to decide if they are willing to accept or reject that booking, and mark it so on the printed referral letter, so you have a record of their decision. If the Consultant rejects a referral/booking you should ask them to write on the referral letter their reason for the rejection.

5.1. Accepting a Referral/Booking

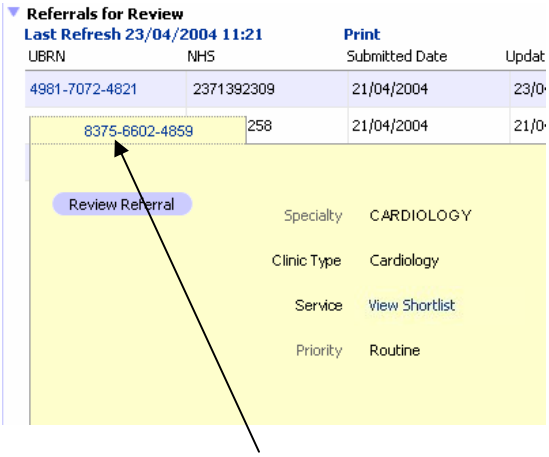
⇒ Log in as '**Service Provider Clinician'**

⇒ Click on

to show the two types of worklists available to you.

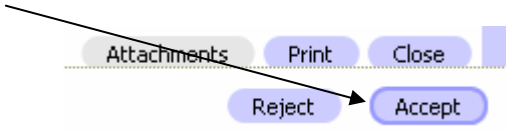
⇒ Click on '**Referrals for Review**'

⇒ You see a list of all referrals (bookings made) that still need to be reviewed.



⇒ To open a referral letter, click on the UBRN in blue and then click on '**Review Referral**'

⇒ With the referral letter open you can accept the referral/booking, by clicking on the '**Accept**' button at the bottom right of the screen.



⇒ Once you have accepted a referral/booking, that patient's referral will disappear from the worklist of '**Referrals for Review**' as it is no longer awaiting a review.

5.2. Rejecting a Referral/Booking

⇒ You can reject the referral/booking by clicking on Reject at the bottom right of the screen.

⇒ You now see a comments box where you must type in the reason given by your Consultant for the rejection, which the referrer can see.

NB: Yellow fields are mandatory

NB: when typing in the reject reason, type in that "This response was dictated by Dr XXX and typed in by XXX (administrator's name) on their behalf".

⇒ Click Reject Referral to confirm the rejection.

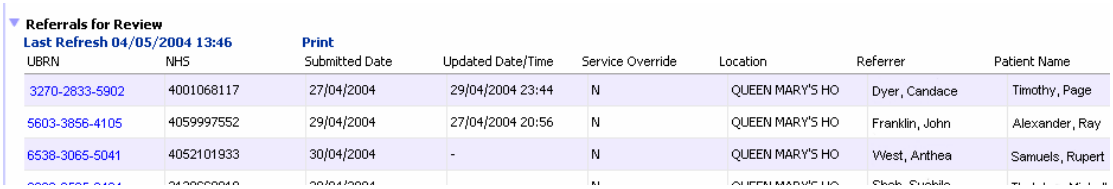
⇒ Once you reject a referral/booking, the patient's appointment will be cancelled in Choose and Book and in your hospital's PAS.

⇒ The referrer's worklist will show them that their patient's referral/booking has been rejected, so they can open that record and see the reason for the rejection.

⇒ It is the responsibility of the referring organisation to contact the patient if a referral/booking is rejected by secondary care.

6 'Service Provider Admin' Worklist Access

⇒ If you log in as '**Service Provider Admin**', and you open the '**Referrals for Review**' worklist, you will see the list of referrals that have not yet been reviewed by your clinical team.



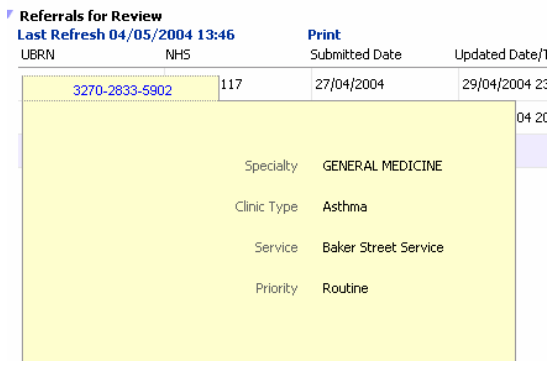
Referrals for Review

Last Refresh 04/05/2004 13:46 Print

UBRN	NHS	Submitted Date	Updated Date/Time	Service Override	Location	Referrer	Patient Name
3270-2833-5902	4001068117	27/04/2004	29/04/2004 23:44	N	QUEEN MARY'S HO	Dyer, Candace	Timothy, Page
5603-3856-4105	4059997552	29/04/2004	27/04/2004 20:56	N	QUEEN MARY'S HO	Franklin, John	Alexander, Ray
6538-3065-5041	4052101933	30/04/2004	-	N	QUEEN MARY'S HO	West, Anthea	Samuels, Rupert

⇒ This list is the same as the Service Provider Clinician view, but when you log in as Service Provider Admin, you are unable to open the referral letter, so you are unable to print off the referral letter for the consultant to review.

⇒ When you click on the **UBRN**, you see a simple summary of the referral, but have no action button to gain any access to the referral letter that contains clinical information.



⇒ Click on the **UBRN** again to close the view

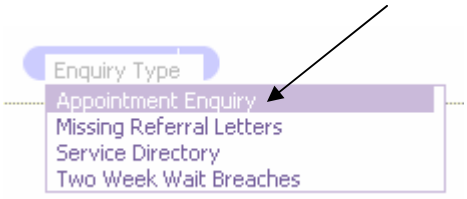
7 Printing off a Referral Letter for a Clinic after it has Been Accepted

⇒ Log in as **Service Provider Clinician.** (If you log in as Service Provider Admin, you will not be able to open the referral letter)

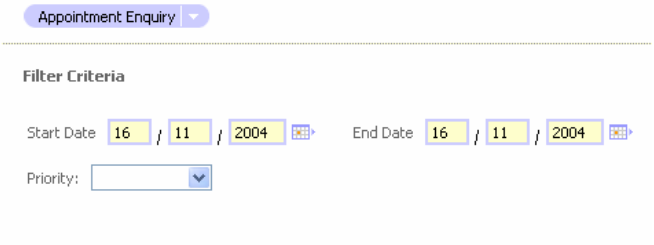
⇒ Once a referral/booking has been accepted, it no longer shows in the worklists, yet you may need to print off a copy of the referral letter prior to the clinic taking place, after the referral has been accepted.

⇒ To print off a referral letter after it has been accepted, from the homepage, click Enquiries at the top right of the screen.

⇒ Click on Enquiry Type, and then click "**Appointment Enquiry**"

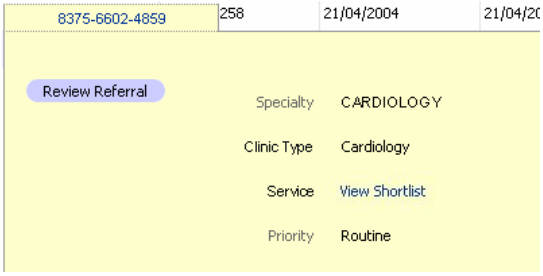


⇒ Select a date range to source the relevant referral that you are looking for, and if known, the priority of the referral, to tighten the search.



⇒ Then click "**Search**" on the right side of the screen, and Choose and Book will search for all referrals within your selected date range for your team.

⇒ Click the UBRN of the referral you wish to open and you can then access the referral letter by clicking on "**Review Referral**"



⇒ You now see the referral letter; click on "**Print**" to print it off.

⇒ Click "**Close**" to return to your homepage.

8 Printing off Advice and Guidance Requests for your Consultant

⇒ Log in as **Service Provider Clinician**

⇒ From your home page worklist, click on '**Advice and Guidance Requests**'

⇒ Click on the UBRN of the request you wish to deal with

⇒ On your keyboard, press "**Print Screen**" or '**Control P'**

⇒ Minimise Choose and Book

⇒ Open up a new Word document and **paste** the advice and guidance request into the word document

⇒ Save the word document accordingly and print it off for your Consultant.

⇒ Get your Consultant to review the advice and guidance request and to write a response.

⇒ Click '**Close'** in Choose and Book to return to your homepage.

9 How to Send an Advice and Guidance Response on Behalf of your Consultant

⇒ Once your Consultant has written a response to the advice and guidance request, you are ready to type in the response on their behalf.

⇒ Log in as **Service Provider Clinician**

⇒ From your home page worklist, click on '**Advice and Guidance Requests**'

⇒ Click on the UBRN of the request you wish to respond to

⇒ This now opens the advice and guidance request for you to respond to

⇒ In the '**Advice Response Comments**' box type in the response as directed by your Consultant

NB: when typing in the response, type in that "This response was dictated by Dr XXX and typed in by XXX (administrator's name) on their behalf".

⇒ Click

to send the response back to the referrer.

10 Changing a Patient's Booking (or Cancelling a Clinic)

NB: If a patient contacts you and requests a change in their appointment date and time, you should refer them to the Choose and Book Appointments Line (CABAL) call centre on 0845 6088 888

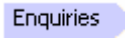
NB: If you cancel a clinic, your patient will need to be contacted by the service provider / hospital, and they must be offered to choose either a new appointment of their choice with you, or be offered the chance for an appointment with any of the other providers their referrer had shortlisted for them.

⇒ If the service provider / hospital needs to change a patient's booking for any reason, you should contact the patient and change their booking to a new date and time of their choice, using Choose and Book. (NB: you must not change the appointment details in PAS if the patient was originally booked using Choose and Book)

⇒ Log in as **Service Provider Admin or Service Provider clinician**

⇒ Contact the patient and explain why you need to reschedule the appointment booking.

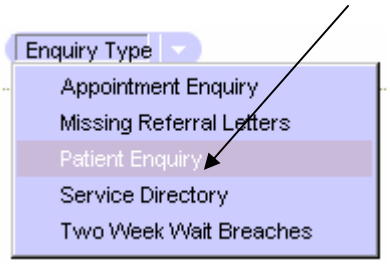
10.1. If your patient Wishes to Book a New date with You

⇒ Click 

at the top right of your screen.

⇒ Click on

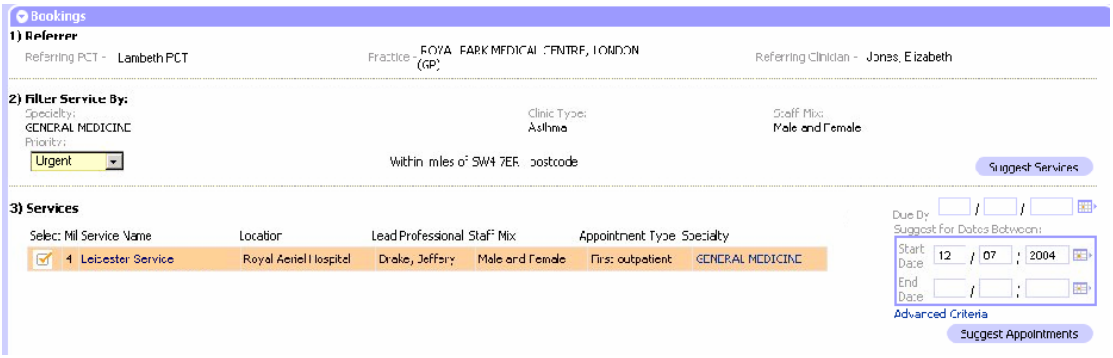
, and then click "**Patient Enquiry**"



⇒ Enter the search criteria for the patient you are seeking and click "**Search**" on the right side of the screen, and Choose and Book will search for you

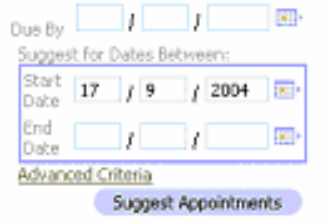
⇒ Click the UBRN of the booking you wish to open, then click '**Rebook Appointment**'

⇒ You now see the '**Bookings**' screen, where you can see your hospital as the patient's choice.


Bookings
1) Referrer
Referring PCT - Lambeth PCT
Practice - ROYAL PARK MEDICAL CENTRE, LONDON (GP)
Referring Clinician - Jones, Elizabeth
2) Filter Service By:
Specialty: GENERAL MEDICINE
Clinic Type: Asthma
Staff Mix: Male and Female
Priority: Urgent
Within miles of SW4 7ER postcode
Suggest Services
3) Services
Select All Service Name Location Lead Professional Staff Mix Appointment Type Specialty
1 Leicester Service Royal Aeriell Hospital Drake, Jeffery Male and Female First outpatient GENERAL MEDICINE
Due By / /
Suggest for Dates Between:
Start Date 12 / 07 / 2004
End Date / /
Advanced Criteria
Suggest Appointments

⇒ If your patient wishes to stay with your hospital, you should select your hospital in the small square to the left of your Service Name

⇒ Before asking Choose and Book to find available appointments for the service(s) selected, you can limit the search by filling in the date range of when your patient should or wishes to be seen.



⇒ The '**Due By**' date is the latest date by when your patient needs to be seen at the hospital.

⇒ The '**Start Date**' (defaulted to the current date) and '**End Date**' are the dates within which your patient may want to be seen at the hospital.

⇒ Click on Suggest Appointments and Choose and Book will display in chronological order all the appointment slots for your selected services within the date ranges you have specified.

4) Appointments
Select Appointment Date/Time Service Name Location Lead Professional
08:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
08:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
09:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
09:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
10:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
10:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
Diary View:
Day Week Month

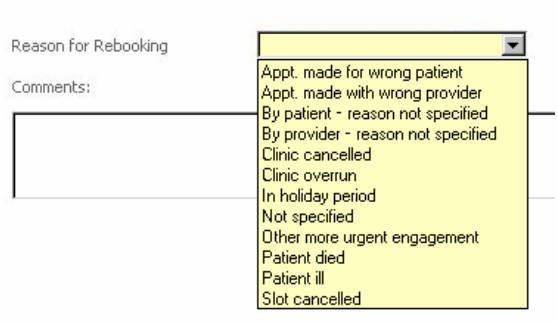
⇒ You can use the scroll bar to see up to 50 appointments currently available.

⇒ You can change the view by clicking on '**week**' or '**month**' if you wish on the right of the screen.

⇒ Select one appointment of the patient's choice by clicking on the round radio button to the left of the chosen date and time.

⇒ Click Rebook .

⇒ Choose and Book shows you a summary of the new booking you wish to make, and you need to pick a '**Reason for Rebooking**' from the picklist (e.g. 'Clinic cancelled'.



⇒ Click Submit. At this point CAB is sending messages to the PAS to cancel and rebook.

⇒ You then see the confirmation of the booking you have submitted, and you have the opportunity to print off an Appointment Summary for the patient, which you may post to the patient, by clicking on '**Print**' on the bottom right of the screen.

⇒ Click Close at the bottom left of the screen to return to your homepage.

⇒ You will now need to print off a clinic letter from your PAS and send it to your patient too.

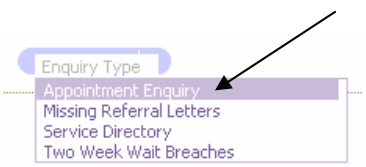
10.2. If your patient Wishes to Make a New Booking with Another Hospital or Take Time to Think About it

⇒ If your patient wishes to make a new booking with another hospital or take time to think about their options, you should give them the number of the Choose and Book Appointments Line (CABAL) **(0845 6088 888),** so they can book a new appointment at another hospital through them.

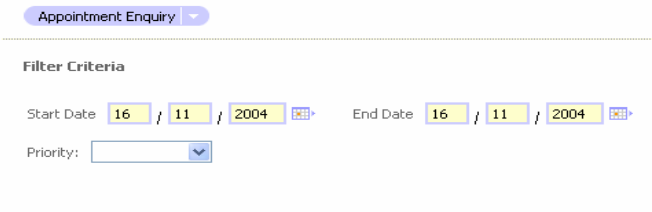
⇒ However, you still need to cancel the appointment in Choose and Book and record the reason for the cancellation, so the CABAL can make the new booking.

⇒ Click Enquiries at the top right of your screen.

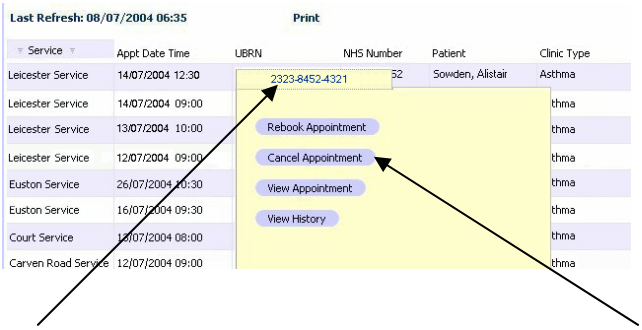
⇒ Click on Enquiry Type, and then click "**Appointment Enquiry**"



⇒ Select a date range to source the relevant appointment that you are looking for.

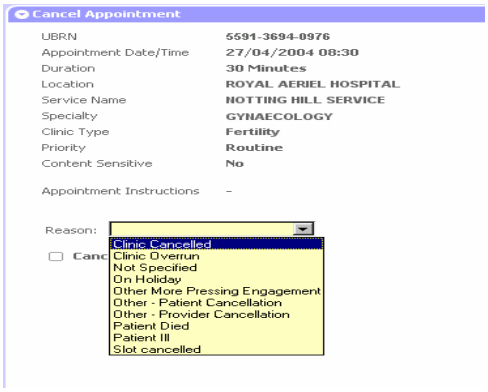


⇒ Click "**Search**" on the right side of the screen, and Choose and Book will search for you



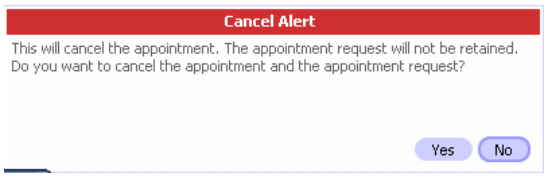
⇒ Click the UBRN of the booking you wish to open, then click '**Cancel Appointment**'

⇒ You now see the Cancel Appointment Screen, where you need to select the reason for the cancellation of that appointment (e.g. Cancelled clinic)



⇒ Click Cancel Appointment at the bottom right of the screen

⇒ Choose and Book now gives you a message for you to be sure of what you are doing. Click Yes if you do want to cancel the appointment.

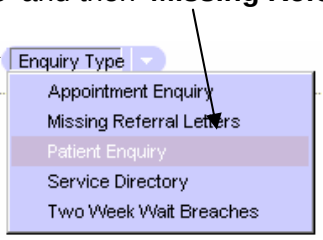

Cancel Alert
This will cancel the appointment. The appointment request will not be retained.
Do you want to cancel the appointment and the appointment request?
Yes
No

11 How to Trace a Booking with no Referral Letter (Missing Letters)

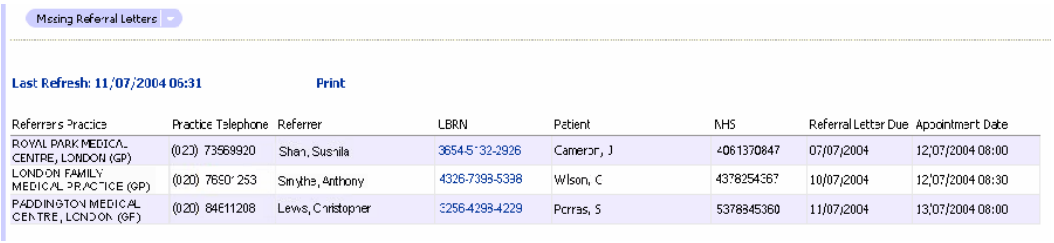
⇒ Log in as **Service Provider Admin**

⇒ Select '**Enquiries**' on the right side of the screen

⇒ Click on '**Enquiry Type**' and then '**Missing Referral Letters**'



⇒ You now see a list of all bookings that have been made into your PAS via Choose and Book, but which have not yet had a referral letter sent by the GP.



Referrers Practice	Practice Telephone	Referrer	UBRN	Patient	NHS	Referral Letter Due	Appointment Date
ROYAL PARK MEDICAL CENTRE, LONDON (GP)	(020) 73569920	Shan, Susmila	3654-5132-2926	Cameron, J	4061370847	07/07/2004	12/07/2004 08:00
LONDON FAMILY MEDICAL PRACTICE (GP)	(020) 7690 253	Smythe, Anthony	4326-7398-5398	Wilson, C	4378254367	10/07/2004	12/07/2004 08:30
PADDINGTON MEDICAL CENTRE, LONDON (GP)	(020) 84611208	Lewis, Christopher	3256-4298-4229	Porras, S	5378845360	11/07/2004	13/07/2004 08:00

⇒ The list contains the patient's name and NHS number, so you can be sure of the patient you are dealing with, plus the telephone number of the GP practice that has not sent the referral letter.

⇒ You can then call the GP to request a referral letter be sent.

⇒ If you wish, you can click on the UBRN of the booking, to see more information.

⇒ Click on '**View Appointment**' or '**View History**' to see more details of the booking

⇒ You can also print off the list, including the GP's contact details by clicking on 'Print'

Referrer's Practice	Practice Telephone	Referrer	UBRN	Patient	NHS	Referral Letter Due	Appointm
ROYAL PARK MEDICAL CENTRE, LONDON (GP)	(020) 46777283	S Shah	3654-5132-2926	Cameron, J	4061370847	07/07/2004	12/07/2004
LONDON FAMILY MEDICAL PRACTICE (GP)	(020) 76901253	A Smythe	4326-7398-5398	Wilson, C	4378254367	10/07/2004	12/07/2004
PADDINGTON MEDICAL CENTRE, LONDON (GP)	(020) 84611208	C Lewis	3256-4298-4229	Porras, S	537884536	11/07/2004	13/07/2004

12 Reviewing Reports and Enquiries

12.1. Reports

⇒ There are reports available to that use data collected as patients are booked using Choose and Book.

⇒ Log in as **Service Provider Admin**

⇒ Click on '**Reports**' on the homepage, and then select the report you wish to view.

⇒ Click on '**Print**' to print off the report you are viewing.

⇒ Click on '**Close**' to return to your homepage.

12.2. Enquiries

⇒ Choose and Book runs enquiries to give you more information.

⇒ To access the enquiries available to **Service Provider Admin**, click on '**Enquiries**' on your homepage.

⇒ From the picklist of enquiries, select type of enquiry you wish to view.

⇒ You can print off your enquiry by clicking on '**Print**'.

⇒ Click on '**Close**' to return to your homepage.